

Linvio Portal

for  Appexchange

Installation and Configuration Guide

Linvio, Inc. 2008

Welcome and thank you for your interest in Linvio Portal. This reference guide will walk you through the process of installing and configuring Linvio Portal in your Salesforce account.

Linvio Portal provides custom objects, Apex classes, and s-controls that allow you to turn your Salesforce account into a portal management system. Linvio Portal also comes with a sample site (written in PHP) that can be used as an out-of-the-box portal, or as a reference for your own custom development.

How to use this guide:

Simply follow the installation and customization steps below to install Linvio Portal in salesforce.com and the sample portal site on your server.

Visit the AppExchange and Install Linvio Portal

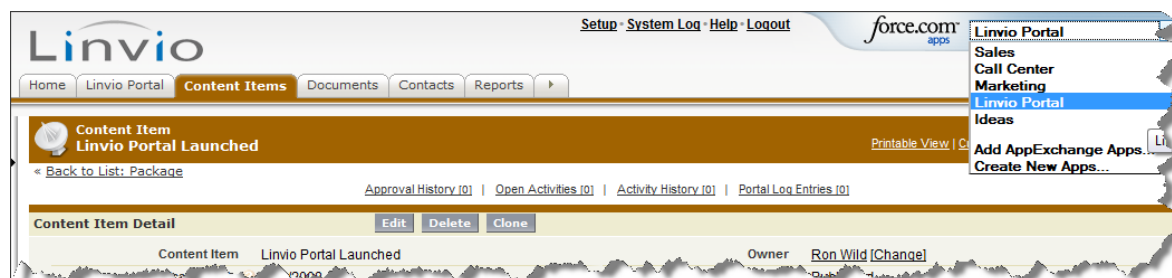
- Go the Linvio Portal listing on the AppExchange
<https://www.salesforce.com/appexchange/detail/overview.jsp?id=a03300000051kudAAA>
- Click “Get It Now”
- Provide your contact information and click on Submit
- Enter your Salesforce username, password, and select whether you are a Salesforce Administrator, Salesforce User or a Free 30 Day Trial User. When finished, click “Continue”
- Designation where you would like to install the application – in your production account (this includes Developer Edition accounts) or in your sandbox. Once you’ve read though the terms of service, click “Continue”.

Review Package Components, Set Security Levels & Install

- Before installing you will have the option to review all the components of Linvio Portal that will be added to your Salesforce account. The package name, version and description will also be noted. Simply click “Continue” to proceed.
- Linvio Portal requires access to your salesforce.com objects through the API. Please review and approve the required access by clicking “Next”.
- Choose security levels to determine which user profiles can access Linvio Portal, and click “Next”.
- Now you’re ready to install the applications. Click “Install” and Linvio Portal will be added to your salesforce.com account. Note: You should be able to install Linvio Portal without having to check the box labeled “*Ignore Apex test failures that may cause the installed application not to function properly.*”

Completing the Installation and Exposing Custom Objects

- Now that the application has been installed you have the option to immediately deploy the Custom Object components or choose to customize them first before rolling them out.
- To proceed, click “Deploy”.
- You’ve now completed the initial installation of Linvio Portal and you will see a summary screen that displays the application details. In addition “Linvio Portal” now appears in the AppExchange drop-down menu in the upper right-hand corner of your salesforce.com account.



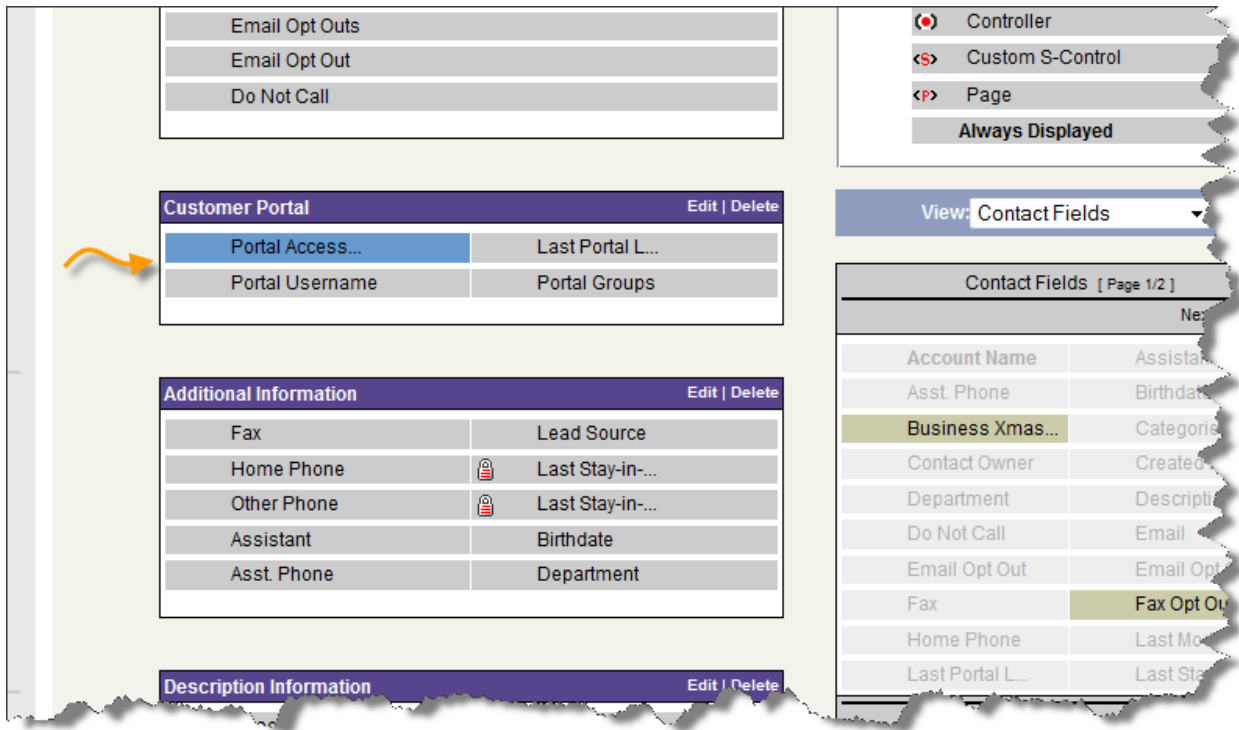
Adding Custom Fields and Objects

Custom fields provided with Linvio Portal for the Contact and Event objects must be added to page layouts manually.

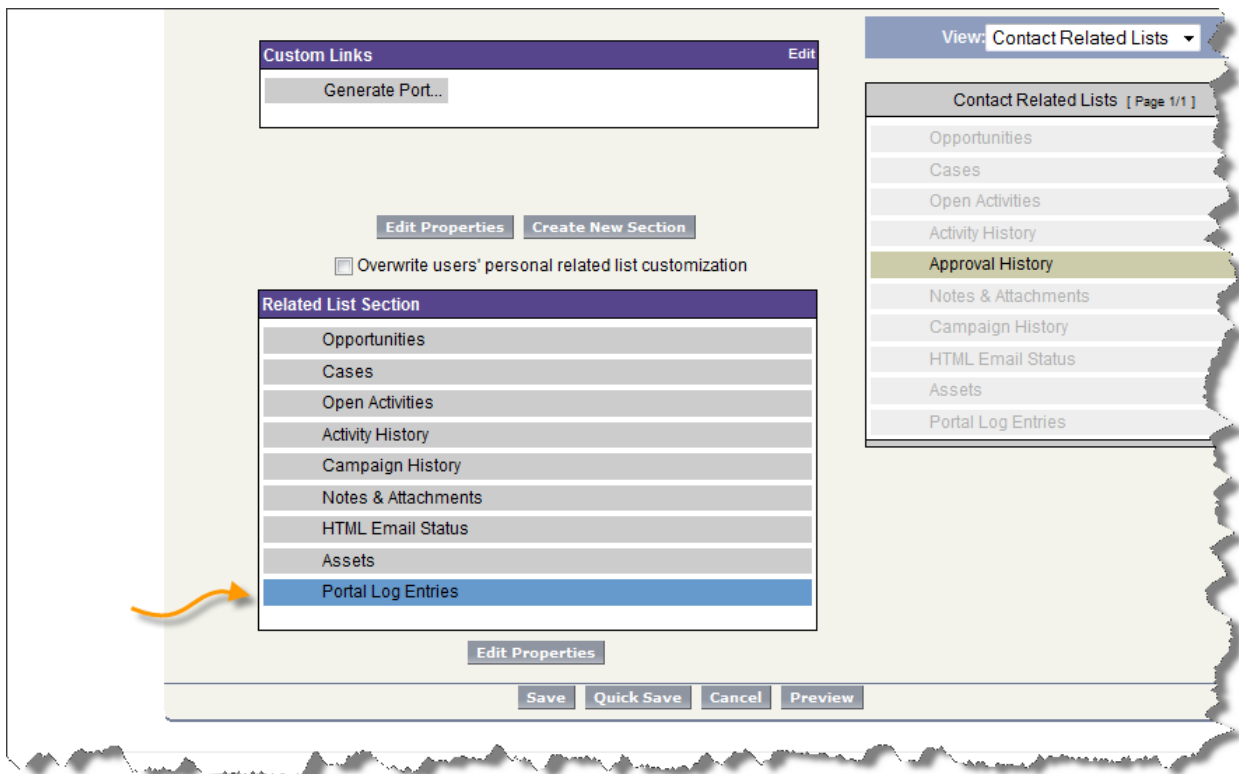
Contact Custom Fields

To expose Linvio Portal custom fields, s-controls and related lists on your Contact Page Layouts:

- Setup > App Setup > Customize > Contacts > Page Layouts
- Choose your page layout and click “Edit”
- Create a new section entitled “Customer Portal” or some other name of your choosing.
- Drag the following custom fields into the new section:
 - Portal Access Enabled
 - Portal Username
 - Last Portal Login
 - Portal Groups



- Drag the **Portal Log Entries** related list to the Related List Section of the layout.



- Single click this related list item within the Related List Section and click “Edit Properties”
- Customize your list view display for Contacts. We recommend the following display fields:

- Log Entry Name
- Attachment Id
- Document Id
- Content Item
- Created Date
- Finally, drag the **Generate Portal Login** custom link to the custom links section of the page layout.
- Click “Save” to save your page layout changes.

Event Custom Fields

Use the same process to add the **Publish To** picklist to your Events page layout(s) if you would like to publish event records to your website or portal.

Installing the Linvio Portal Sample Site

To get you started, Linvio Portal comes with a sample portal website written in PHP. The sample site includes pages that make use of features in Linvio Portal – including customer profile updates, publishing of documents from the document folders in Salesforce, displaying Content Items (basic content management) in the portal, and of course authenticating users and managing access through groups.

You will need a web server with PHP 5.2.1 (or higher) with SSL and SOAP extensions enabled, to host the sample site.

You will also need a Salesforce account that will be used by the portal to connect to your Salesforce instance. This account will act as the proxy login account for all your portal users and for any content published to your site.

As a best practice, we recommend setting up a separate administrator account in Salesforce to use as your proxy account. You can then manage access permissions for this account as you see fit. For additional security you can also configure your proxy account for “API Only” access. Please consult the Salesforce system documentation for help in setting up API Only access.

Downloading the Sample Site

- To download the sample site, go to the Content Items tab in Linvio Portal. The default splash page for this tab includes instructions for getting started, and a “Download the sample site” link. Click this link, or if the splash page is hidden, visit <http://www.linvio.com/cosmicportal/samplesite> .
- Unzip the download file and upload the contents to a directory on your web server (for this example: **/portal**).

Configuring the Sample Site

The Portal Configuration File

Here are the steps required to edit your Linvio Portal configuration file and set up the connection between the sample site and Salesforce.

- Edit the Linvio Portal configuration file `config.ini.php` in the `/portal` directory.

```

1 // Cosmic Portal Configuration File
2 ;<?php
3 [SalesforceAPI]
4 sfUsername = "admin@acme.com"
5 sfPassword = "password01xxsecuritytokenforthisaccountxx"
6 sfEndPoint = "https://www.salesforce.com/services/Soap/u/11.1"
7 sfWSDL     = "partner.wsdl.xml"
8
9 [Organization Info]
10 sfOrgId    = "00D7000000aa444"
11 orgName    = "Acme"
12 copyrightNotice = "Copyright 2008, Acme, Inc. All rights reserved."
13 portalURL  = "https://www.acme.com/portal"
14 siteURL    = "http://www.acme.com"
15
16 [Encryption]
17 encKey     = "acmeEncKey"
18
19 [Administration]
20 pwdOverride = ""
21 enableSFGoogleAdwords = true
22 siteAvailable = true
23
24 [Logging]
25 traceEnabled = false
26 logFile     = "/tmp/website_log.txt"
27
28 ;?>

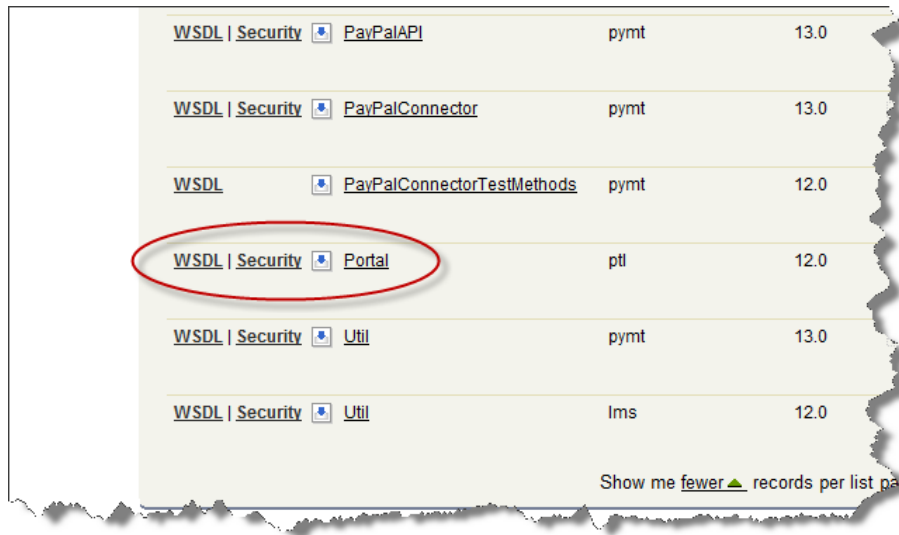
```

- Update the parameters with your own company and Salesforce account information:
- **sfUsername** and **sfPassword** should be the login credentials for the proxy admin account that will be used by Linvio Portal to access your account through the API.
- **sfOrgId** should be set to the org Id assigned to your Salesforce account. This will be used to enable Google Adwords for Salesforce tracking code, pages for submitting cases to Salesforce, and other org-Id driven features.
- Update the **copyrightNotice** value.
- Set the **portalURL** and **siteURL** values to your full website domain and path values for both the portal and the main website.
- If you plan to use the encryption methods included in the Linvio Portal sample site you will want to assign some random string value to the encryption key **encKey**. This setting is not used by default.
- **pwdOverride** may be set to a secret password that administrators can use to login to any account. Leaving this parameter empty disables the password override feature.
- Set **enableSFGoogleAdwords** to activate Google Adwords for Salesforce tracking code in sample site pages.

- Leave **siteAvailable** equal to **true** unless you want to temporarily disable login access to the site (ie. When the site is down for repairs or updates).
- Set **traceEnabled** to **true** to enable writing of trace instructions to the site log file for debugging.
- And provide a full path for **logFile** for logging of errors and trace messages. Make sure PHP has access to write to files in this directory.

The Linvio Portal WSDL File

Generate an up-to-date Linvio Portal WSDL file from inside your Salesforce account by going to Setup>Develop>Apex Classes (after you have installed Linvio Portal off of the AppExchange).



Click on “WSDL” to download the version intended for you instance of Salesforce and save this file as `linvioportal.wsdl.xml` in the `/soapclient` directory of the sample site.

NOTE: You may also edit the WSDL file that comes with the sample site directly if you choose; however this approach requires a bit more care. To edit the WSDL file directly:

1. Search for the string similar to <https://na5-api.salesforce.com/services/Soap/class/ptl/Portal> near the end of the file. (na5 has been used in this example)
2. Replace the server name (“na5”) with the server name your instance of Salesforce is hosted on. For example: If you see “https://na3.salesforce.com/...” in the address bar of your browser when you are logged into Salesforce, you would change the WSDL to point to <https://na3-api.salesforce.com/services/Soap/class/ptl/Portal>

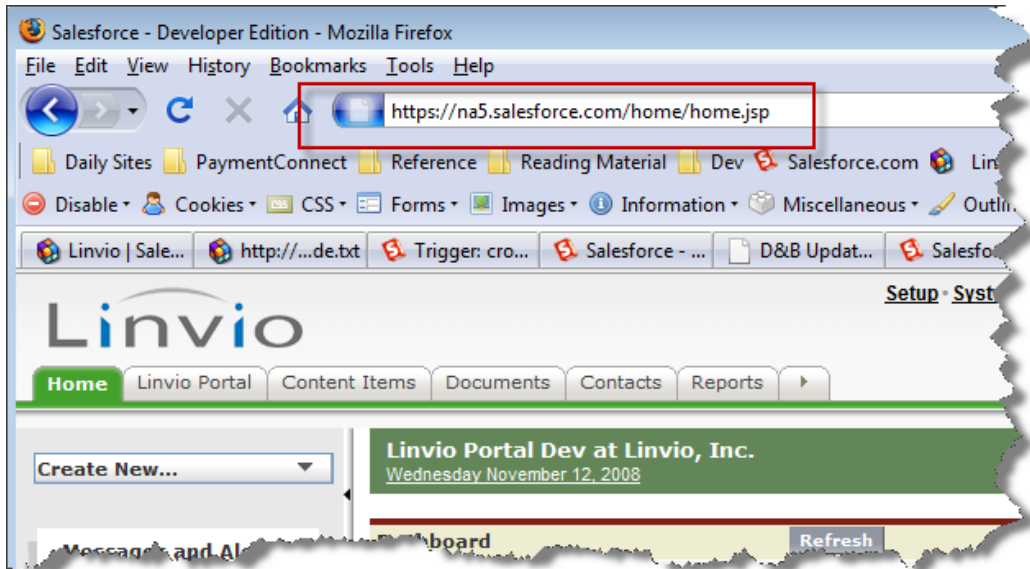


Figure 1. Determining your Salesforce server name.

Changing the Portal Site Style Sheets

- The sample site includes a default set of stylesheets, banners and other image files in the **/portal/styles** directory.
- Simply copy one of the style directories under **/portal/styles** (or create a new one) and edit the stylesheets and images to re-skin your portal.
- Then edit **/portal/styles/main.css** to point to the style sheets in your new directory.

Configuring Linvio Portal (In Salesforce)

A few configurations are also required inside Salesforce.

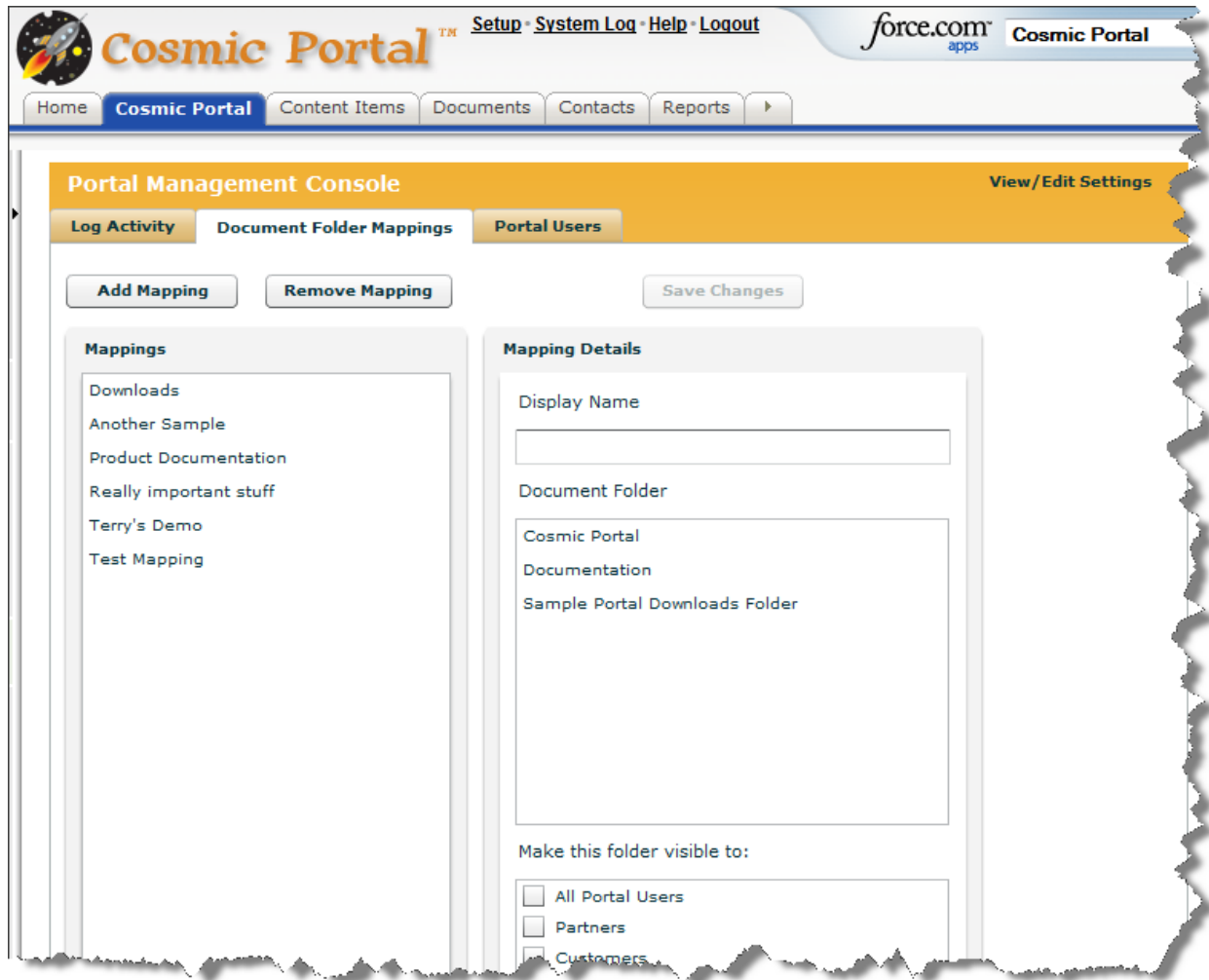
Linvio Portal Settings

- Select Linvio Portal in the applications dropdown in the upper right corner of Salesforce and click on the Linvio Portal tab to view the Portal Management Console.
- Click on “View/Edit Settings” in the upper right corner of the page.
- Enter the full URL for the sample site (e.g. <https://www.acme.com/portal>) in the Portal URL field. We recommend using SSL and an https URL string for security reasons.
- Make any necessary changes to the default login confirmation email settings. The settings are used to format and control email that Linvio Portal sends portal members when login credentials are generated or updated.
- Check **Log Document Downloads** if you want to keep track of documents downloads through Linvio Portal. (See Document Folder Mappings below)
- Check **Log Portal Logins** if you want to track user logins.

Note: If you are logging downloads and logins and do not regularly delete old log entries (from `ptl__Portal_Log_Entry__c`) you may exceed your account storage limits in Salesforce. Be sure to clean out unwanted log entries regularly. To setup log file cleanup on a scheduled basis, we recommend using CronKit – a free Salesforce add-on also available from Linvio on the AppExchange.

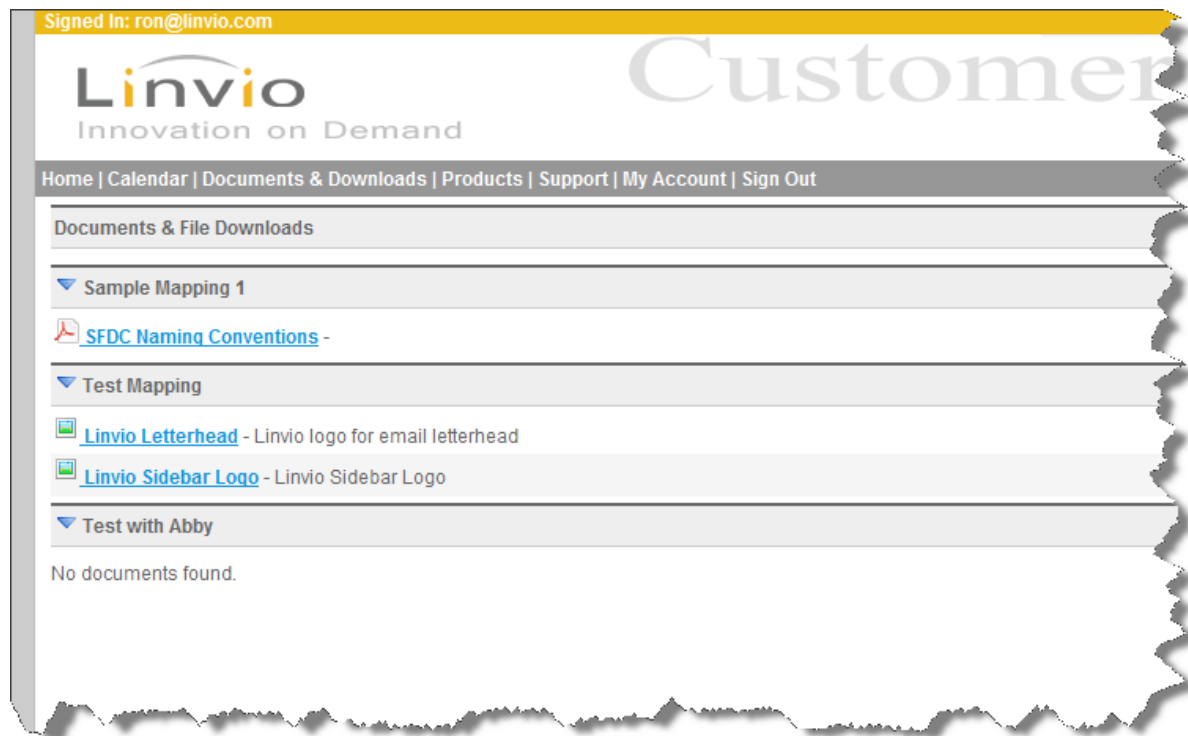
Document Folder Mappings

The document folder mappings feature allows you to define which Salesforce document folders will be shared with which groups of portal users.



1. Select an existing mapping or click “Add Mapping” to enter a name for a new mapping.
2. Edit the name of an existing mapping
3. Under “Mapping Details” select a document folder to be shared with portal users
4. Check the portal groups who will be allowed to see this content. (A Portal Groups picklist is available on Contacts that may be used to assign portal members to groups and control access to content and pages on your site.)
5. Save Changes.

To view your mappings, log into the portal and click “Documents & Downloads” in the menu bar of the portal site.



Creating a Portal Login

- Go to a Contact record in Salesforce and click the **Generate Portal Login** custom link.

Contact
Mr. Ron Wild

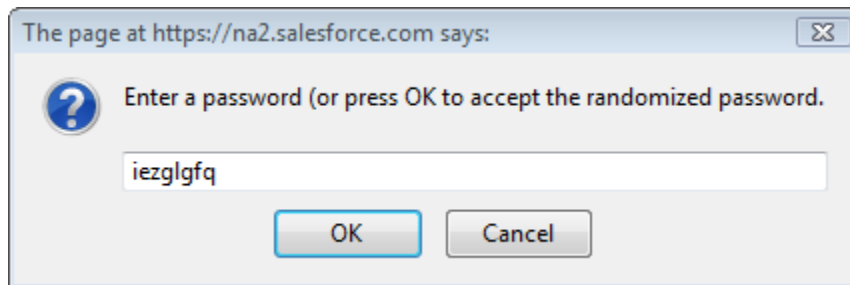
[Printable View](#) | [Customize Page](#) | [Help](#)

[Opportunities \[0\]](#) | [Cases \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[1\]](#) | [Campaign History \[0\]](#) | [Notes & Attachments \[1\]](#) | [HTML Email Status \[1\]](#)
[Portal Log Entries \[5\]](#)

Contact Detail [Edit](#) [Delete](#) [Clone](#) [Request Update](#)

Custom Links	Generate Portal Login	
Contact Owner	Ron Wild [Change]	Phone (503) 421-7800
Name	Mr. Ron Wild	Home Phone
Account Name	Linvio, Inc.	Mobile (503) 421-4387
Title	Director, Warehouse Mgmt	Other Phone
Department	Warehouse Mgmt	Fax (503) 421-7801
Birthdate	10/9/1936	Email dev@loqixbiz.com
Reports To	[View Org Chart]	Assistant
Lead Source	Word of mouth	Asst. Phone
Mailing Address	621 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	
▼ Portal		
Portal Access Enabled	<input checked="" type="checkbox"/>	Portal Username dev@loqixbiz.com
Portal Password	7f925ebcd362ddfc46795f3e747c6b62	Last Portal Login 7/23/2008 12:38 AM
Portal Groups		

- Linvio Portal will generate a random password and display a dialog window allowing you to change, accept or cancel.



- Click “OK” to proceed.
- Linvio Portal will save the new login information and send an email to the Contact with their username, password, and a link to the portal. Initially the username is the contact’s email address – although you can change the username by editing it on the contact page.

Additional Help

For more information visit the Linvio website at www.linvio.com or our forum www.linvio.com/forum .

Consulting and integration services are also available from Linvio.

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